



The **Financial Sales Indicator™** is a tool to help managers in the financial services industry make better hiring decisions.

The assessment measures **psychological factors, personal experiences and work behaviors that predict success** in financial sales jobs.

The assessment is based on the pioneering work of Dr. Steve Torkel. Dr. Torkel has surveyed over 50,000 job candidates, salespeople, and branch managers on the experiences that predict sales success in the financial services industry. He has conducted numerous studies on the work, life and psychological factors that predict actual sales results.

Measures 8 predictors of sales success:

➤ **Psychological Factors**

- Proactive Orientation
- Resilience
- Sociability

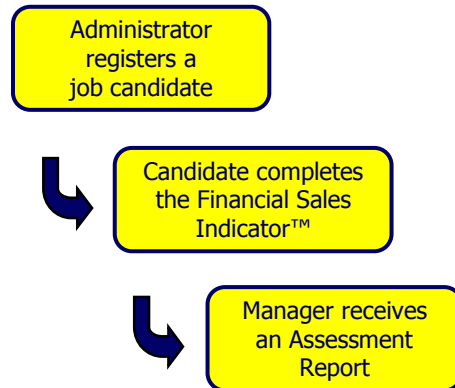
➤ **Personal Experience**

- Prospecting
- Financial Exposure

➤ **Work Experience**

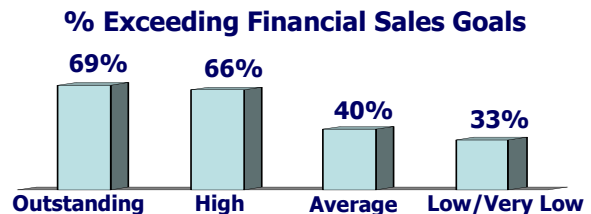
- Work History
- Compensation History
- Sales Experience

The assessment is administered seamlessly over the Internet.



Measures "Test Accuracy" to identify candidates who are faking.

Three recent studies demonstrated the power of the Financial Sales Indicator™. Salespeople who scored Outstanding on the assessment exceeded their financial sales goals over twice as often as those who scored Low or Very Low.



Call Torkel Research today to learn more about how the Financial Sales Indicator™ can increase the productivity of your financial salesforce.

908-433-9859 • sales@torkelresearch.com • www.torkelresearch.com

Sample Assessment Report

Name:	Jane Sample	Company:	ABC Financial
Date:	April 18, 2008	Company #:	1000
Candidate ID:	1000-49A64E67	Location:	Anytown

Overall Assessment: **High** Overall Score: **76**

Psychological Factors	Rating
Proactive Orientation Action-oriented, competitive, and quick decision-making style.	High
Resilience The ability to bounce back quickly from setbacks.	Outstanding
Sociability Preference for social interaction.	High
Personal Experience Factors	
Prospecting Number of contacts, natural markets and preference for prospecting.	High
Financial Exposure Investment experiences and exposure to financial media.	Low
Work Experience Factors	
Work History Pattern of job stability with previous employers.	High
Compensation History Significant compensation and career progression.	High
Sales Experience The amount and type of sales experience.	Average
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Test Accuracy	Accurate

About Steve Torkel, Ph.D.:

Steve is an Industrial Psychologist and a proven industry authority on hiring, developing, and retaining employees. In his 14 years with Merrill Lynch, he designed assessment and development systems for Financial Advisors (FAs), managers, support staff, and home office employees. He assessed over 200,000 employees and job candidates.

Steve also managed surveys, executive feedback, and research consulting in many parts of the business. He created the firm's wealth management assessment program, and partnered with the executive team to build the new FA Development Program. He worked closely with Managing Directors and senior FAs in developing the hiring process, training curriculum, coaching program, and developmental assessments.